Section D. Requests: Borrow

Section D. Requests: Lend

Section D. Requests: Manage

Section D. Requests: Report

Section D-1. Request Material by Unique Key

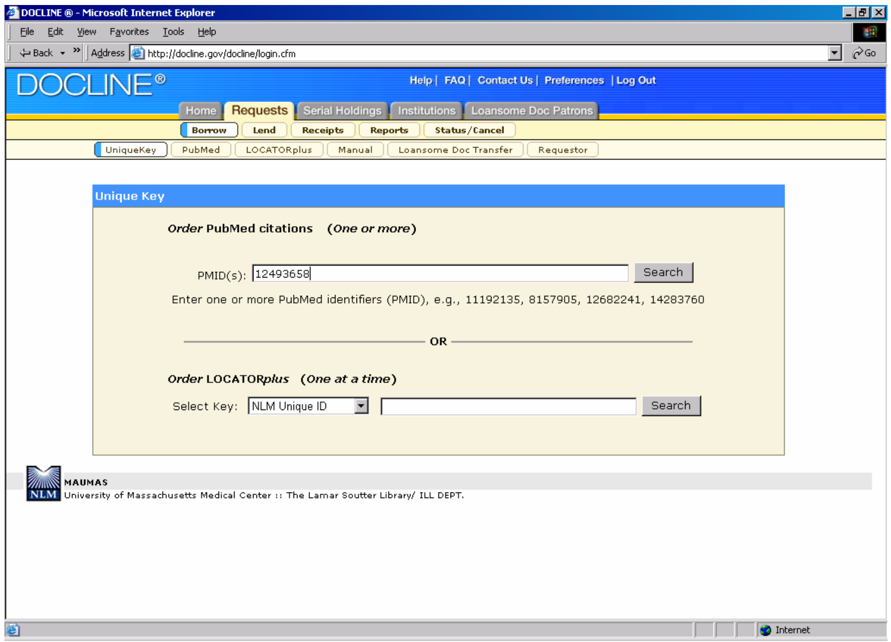
There are four different methods to search a request: [1.] by Unique Key; [2.] by PubMed search; [3.] by LOCATORplus; and [4.] by Manual citation.

To request materials using a “unique key” (such as: PMID), do the following:

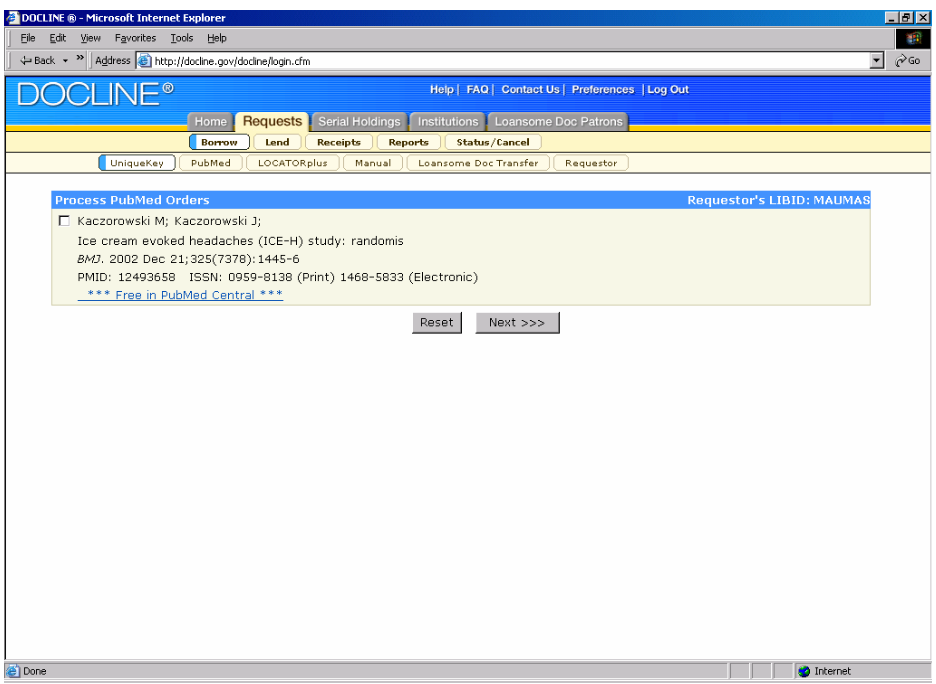
STEP	ACTION: Request by Unique Key
1	Select **Requests** from DOCLINE Main Menu
2	Select **Borrow**
3	Select **Uniquekey**
4	Enter up to 11 PMIDs in the box labeled **PMID’s**, separating each PMID with a comma or a space. Click **Search.**
5	Select check-boxes on "Process PubMed Orders" page to order specific selections and click **Next** -or–just click **Next** to order all documents.
6	Review and modify information on "Routing Instructions" screen; Click **Next**.
7	Edit delivery address on "Delivery Address" screen, as needed.
8	Click **Finish** to complete order request. [Click **Prev** to return to the previous Borrow input screen.]
9	Once the transaction is completed successfully, the “Request Confirmation” page will display with the citation(s), the DOCLINE request numbers, and the library to which the request is routed. If the request could not be placed, you’ll be informed of the problem with the request. Click **Return** to make changes on the “Routing Instructions” page.
10	Click the linked request number to view an individual request. -or– click **Full Display** to view all of the items requested.
11	To print the request once you have displayed items, use your browser’s Print feature.
12	Click **Return** to continue.

Section D-1. Request Material by Unique

If you have a patron request with a PMID (PubMed ID), you need only enter that number to begin order for the borrow request -



The PMID uniquely describes a citation in PubMed, which is immediately available for ordering -



Section D-1. Request Material by Unique Key

To request materials using a “unique key” (other than PMID), do the following:

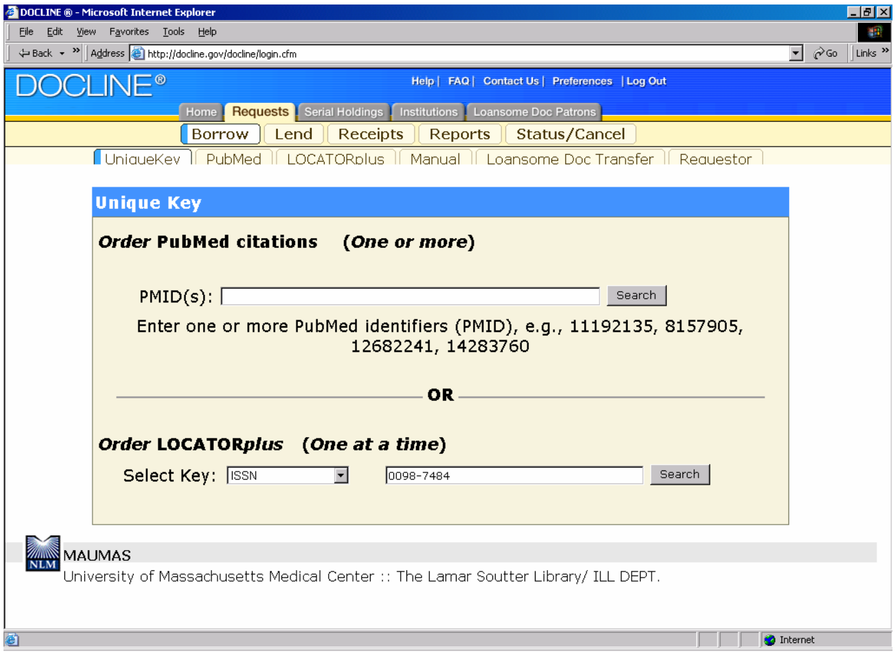
STEP	ACTION: Request by Unique Key
1	Select **Requests** from DOCLINE Main Menu.
2	Select **Borrow.**
3	Select **Uniquekey**
4	Click drop-down box for "Select key" from **LOCATORplus** Choose from: **NLM Unique ID** (OPAC record number) **ISSN**: International Standard Serial Number **ISBN**: International Standard Book Number **OCLC**: OCLC record number **Journal Title Abbreviation**: NLM designated journal title abbreviation.
5	Enter one LOCATORplus UI, and click **Search**.
6	Complete citation information as completely as possible in "Citation Input" form, and click **Next**.
7	Review and modify the information on "Routing Instructions" screen as necessary, and click **Next**.
8	Edit delivery address on "Delivery Address" screen, as needed.
9	Click **Finish** to complete your order request **--or–** click **Prev** to return to the previous Borrow input screen.
10	Once the transaction is completed successfully, the “Request Confirmation” page will display: [a.] the citation(s); [b.] DOCLINE request numbers; and [c.] the library to which the request is routed. If the request could not be placed, you will be informed of the problem with the request. Click **Return** to make necessary changes on the “Routing Instructions” page.
11	Click the linked request number to view the request.
12	To print the request once you have displayed the item, use your browser’s print feature.

Note:

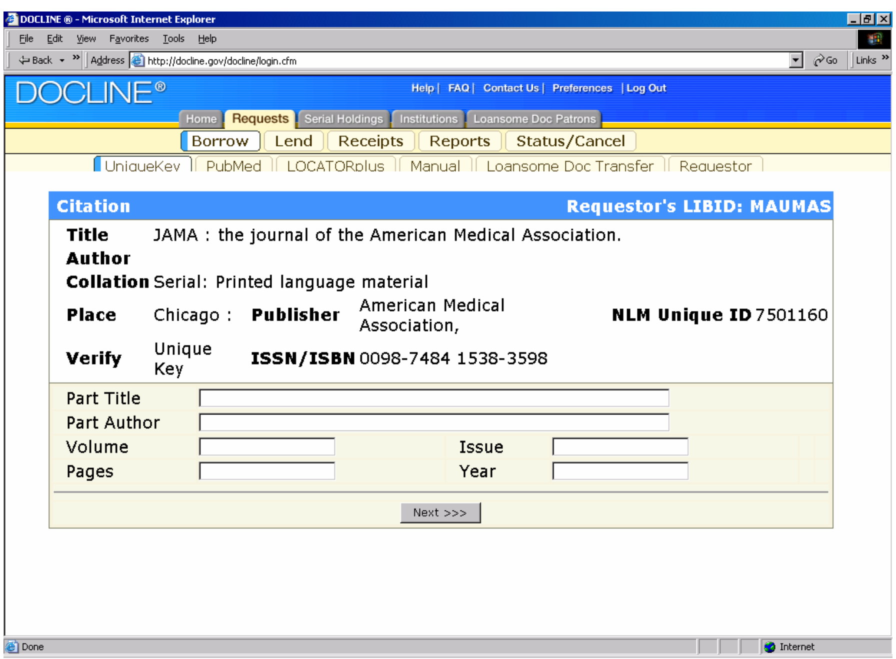
- NLM Unique ID includes the old TCN or Serial Holdings SEQ Number.

Section D-1. Request Material by Unique Key

Searching on ISSN for *JAMA* -



Citation information is incomplete; you will need to provide additional citation information, such as: Part Title, Part Author, Volume, Pages and Year -



Section D-1. Request Material by PubMed Search

To request materials by first searching PubMed, do the following:

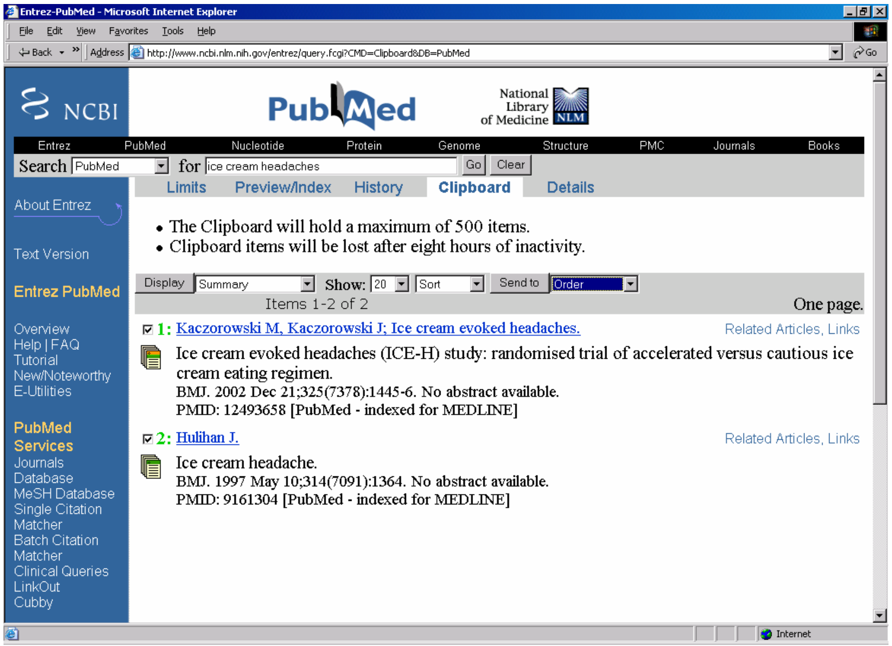
STEP	ACTION: Request by PM Search
1	Select **Requests** from DOCLINE Main Menu.
2	Select **Borrow.**
3	Select **PubMed.**
4	Perform PubMed searches.
5	Click checkboxes to the left of each citation you want to order.
6	Select **Order** from the drop-down menu adjacent to **[Send To]** and click **[Send To]**, skipping to step 10 **-or–** select **Clipboard** from the drop-down box and click **[Send To]** to save citations for ordering.
7	Select **Clipboard** from the top menu bar to view saved citations.
8	Click check-box to the left of each citation you want to order. Select **Order** from the drop-down box and click **[Send To]** button.
9	Review "Process PubMed Orders" screen in DOCLINE.
10	Click check-boxes to order selectively, then click **NEXT** **-or–** if no boxes are checked, click **NEXT** to order all of the citations.

Notes:

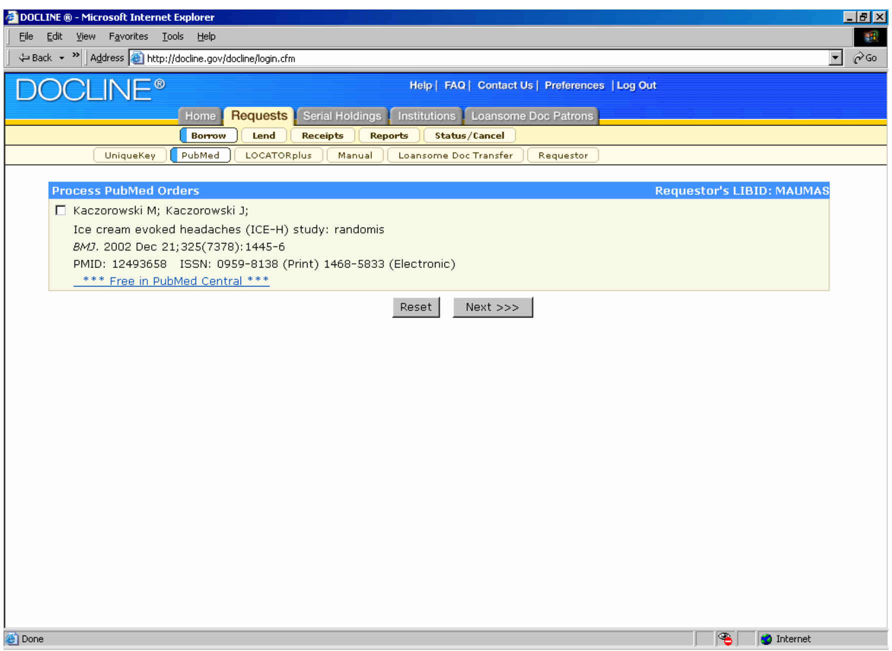
- When performing multiple searches, you should save selected citations to the Clipboard. PubMed's **Clipboard** feature allows you to save journal citations and to batch "borrow requests."
- The Clipboard must be cleared after each order.
- Citations remain on the Clipboard until there's either **8 hours** of inactivity at the local computer **-or–** until you manually remove items.
- To remove citations that are not wanted: [a.] click the appropriate checkboxes; [b.] select **Remove from Clipboard** from the drop-down box; and [c.] click **[SendTo]** before processing the order.

Section D-1. Request Material by PubMed Search

Check off desired items from the Clipboard, select **Order** from the drop-down list, click "**Send to**" -

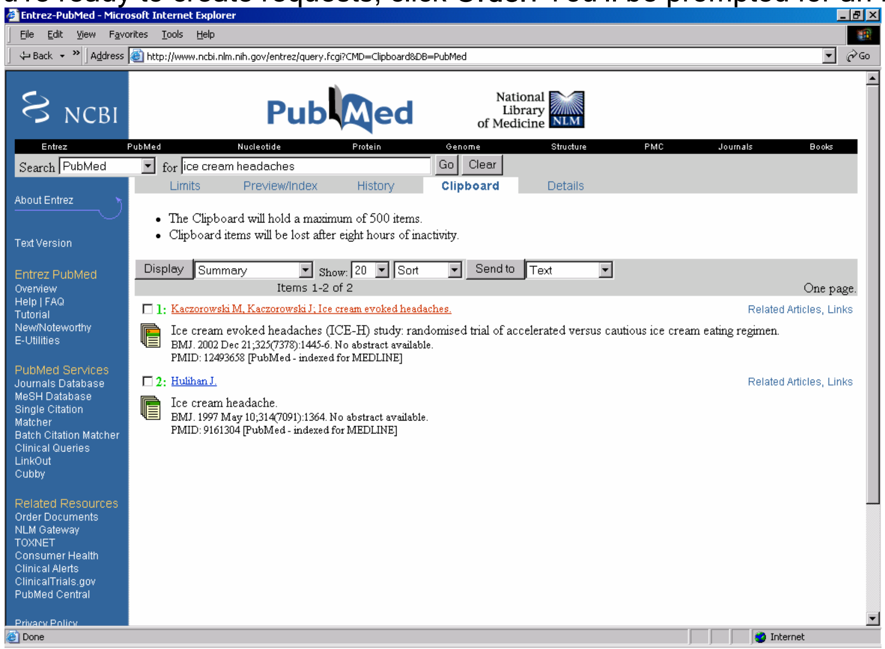


The Process Order screen will be displayed with citation information for items to be ordered -

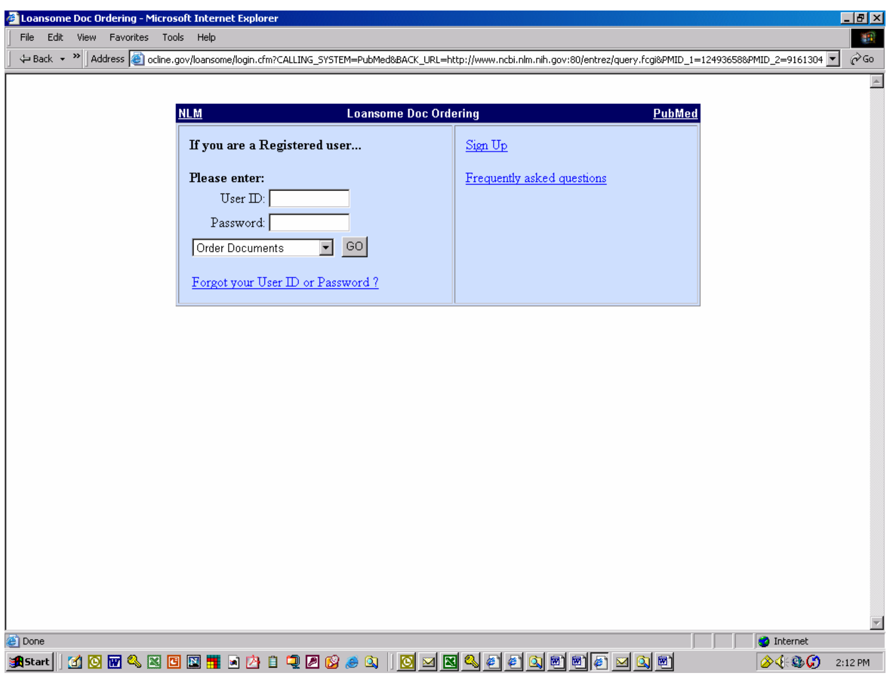


Section D-1. Request Material by PubMed Search

As a Loansome Doc patron, PubMed's Clipboard feature allows you to save journal citations And to batch "borrow requests." You can use this feature by selecting citations, then clicking **Clip Add**. When you're ready to create requests, click **Order**. You'll be prompted for an LD account.



Provide your User ID, Password, and Ordering Library's LIBID for LD Requests –



Section D-1. Request Material by LOCATORplus

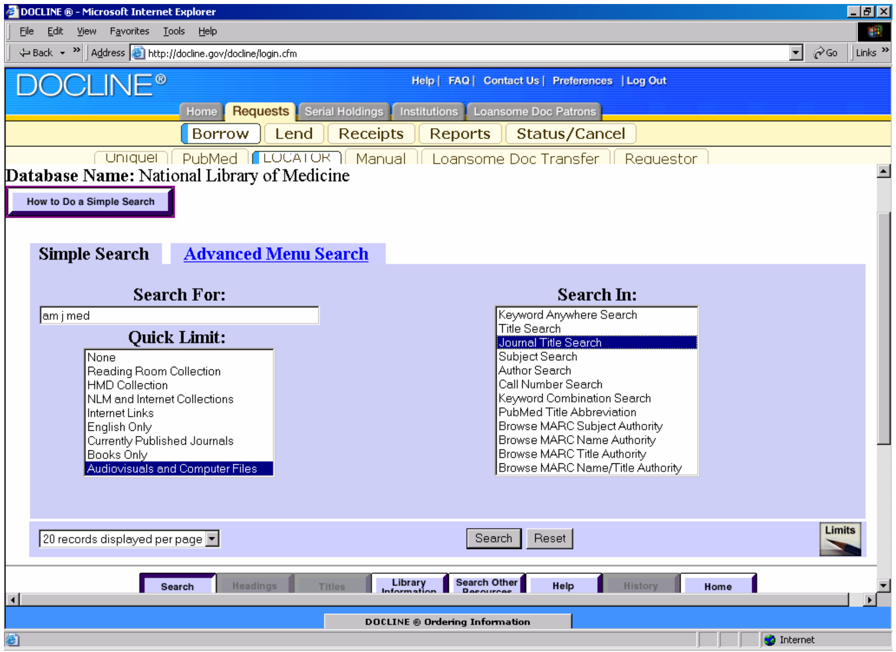
STEP	ACTION: Request by LOCATORplus
1	Select **Requests** from DOCLINE Main Menu.
2	Select **Borrow.**
3	Select **LOCATORplus.**
4	Perform **LOCATORplus** search: **Search Tips**: **Keyword Anywhere** is search default. Use as many specific words as you have from the title, author, or any part of the record. Select **Title/Subject/Author** search if you know the exact title or author Refer to the **LOCATORplus** help for further searching tips.
5	Click on **DOCLINE Order** (highlighted in blue frame) at the bottom of the screen.
6	Complete Routing Instructions and Delivery Address Information in DOCLINE.
7	Review and modify the information on "Routing Instructions" screen as necessary, and click **Next**.
8	Edit delivery address on "Delivery Address" screen as needed.
9	Click **Finish** to complete your order request.
10	Once the transaction is completed successfully, the “Request Confirmation” page will display with the citation(s), the DOCLINE request numbers and the library to which the request routed. If the request could not be placed, you will be informed of the problem with the request. Click **Return** to make necessary changes on the “Routing Instructions” page.
11	Click the linked request number to view the request.
12	To print the request once you have displayed the item, use your browser’s print feature.

Notes:

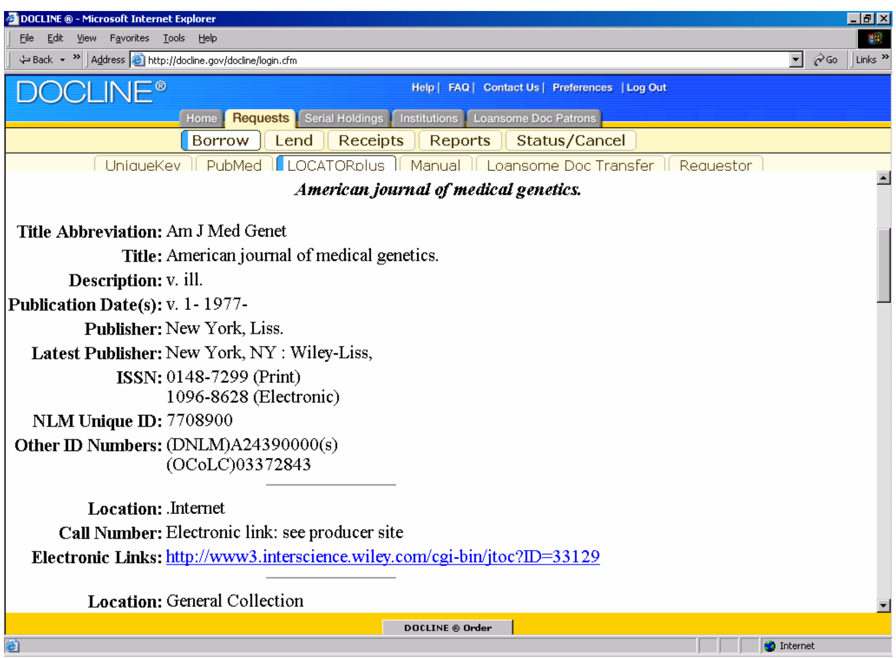
- You may Order one (1) title at a time from **LOCATORplus**
- Do NOT use check-boxes to the left of the title to make an order. Those check-boxes are for marking to print or save a **LOCATORplus** record.

Section D-1. Request by LOCATORplus

To search for *The American Journal of Medicine* in LOCATORplus, enter the title and click **Search** –



NLM's bibliographic information from the OPAC is displayed; review information and click **Document Order** (at bottom of page) –



Section D-1. Request Material by Manual Citation

To request copies of materials manually, do the following -

STEP	ACTION: Request by Manual Citation
1	Select **Requests** from DOCLINE Main Menu.
2	Select **Borrow.**
3	Select **Manual.**
4	Fill out the bibliographic and citation fields as completely as possible in the Citation Input form.
5	Select **Type**: Journal or Monograph from pull-down menu.
6	Click **Next.**
7	Review the “Routing Instructions” screen, modifying the M/A/N Map as appropriate for this item.
8	Click **Next.**
9	Edit delivery address on "Delivery Address" screen as needed.
10	Click **Next.**
11	Click **Finish** to complete your order request.
12	Click the linked request number to view the request.
13	To print, use your browser's print feature.

Notes:

- All requests ordered manually will route on your library’s M/A/N Map - ***not*** through your library’s automated Routing Table. If your M/A/N Map is left blank, requests will then be forwarded to NLM.

- Submit requests manually **only as a last resort**; it is recommended to use the PubMed, UniqueKey or LOCATORplus search features. These features take advantage of NLM's "unique identifiers" that provide links to the Serial Holdings File, making it possible to automatically route requests.

- Reference numbers for selected citations turn "green" when they are added to the Clipboard. The Clipboard feature supports storage for a maximum of 500 items. Clipboard items will be lost after **eight hours** of inactivity.

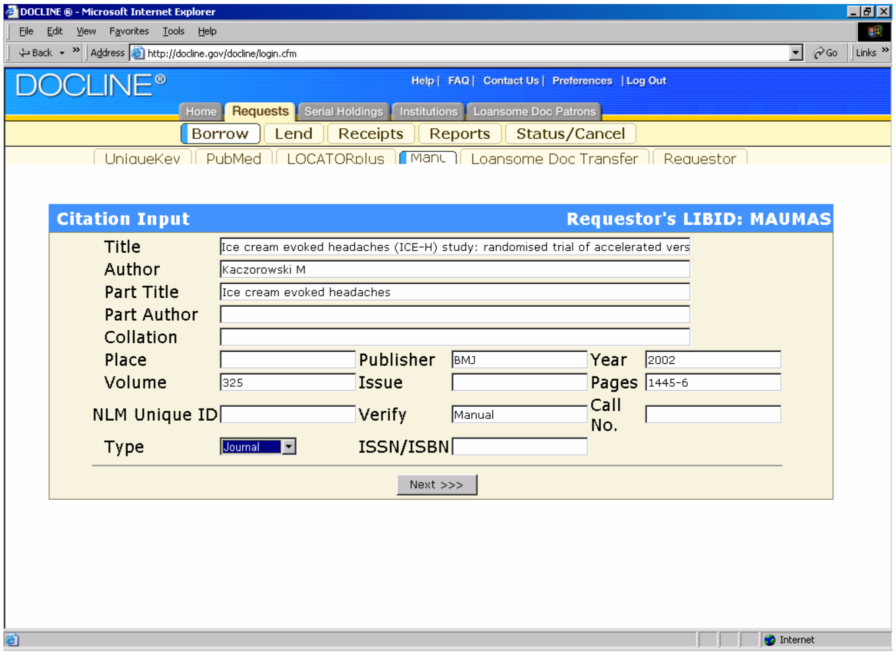
- LOCATORplus will reference monographs as well as journals.

- If you do not know: (a.) a journal's title abbreviation; (b.) the NLM UI; (c.) the ISSN; or (d.) the OCLC number, use LOCATORplus.

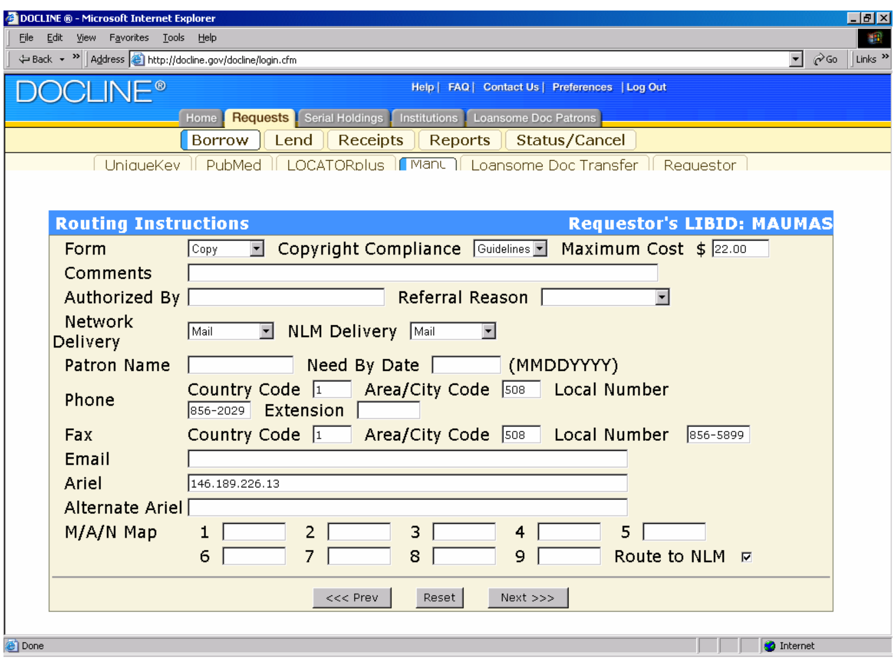
- All borrow requests can be viewed online via DOCLINE's Status/Cancel feature, where you also find information about request history.

Section D-1. Request by Manual Citation

Click **Requests**, **Borrow**, and **Manual** to bring up a blank *Citation Input* screen -



When you've completed entering information, click **Next >>>** and the *Routing Instructions* screen displays -



Section D2. Transfer Loansome Doc Requests

Libraries may transfer unfilled Loansome Doc requests into DOCLINE if the Loansome Doc patron has authorized "Transfer to DOCLINE" in LD Patron profile.

STEP	ACTION: Transfer LD Requests
1	Select **Requests**, then **Borrow**, then **Loansome Doc Transfer**.
2	Click **GO** to retrieve all pending requests or enter specific request no.
3	Select Patron or Library from the "Ship To" select box.
4	Update the "Ship To" information as needed for the request.
5	Click the displayed request number(s) under the "Transfer Request" column to initiate the transfer into DOCLINE.
6	Complete the Routing Instructions. Select the appropriate Referral Reason (required for LD Transfer; it cannot be left blank).
7	Review/Update patron's delivery address.
8	Click **Finish**.

Notes:

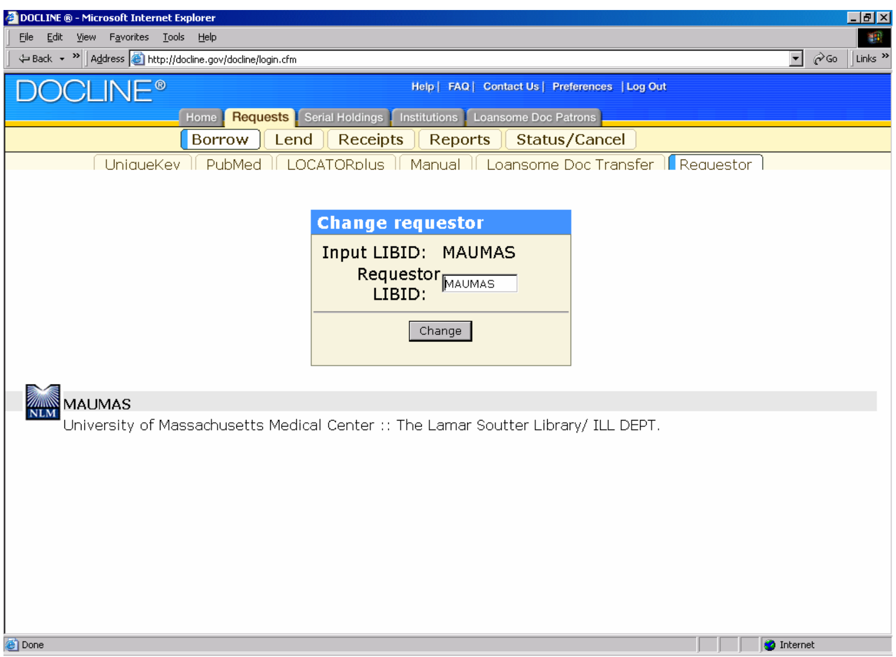
- A message box will appear if the patron has not authorized the Ordering Library to obtain articles from other libraries **–or–** if ordering library is unable to fill the request. Click **OK** to continue transfer **–or–** **Cancel** to end transaction.

Section D-3. Change Requestor

The purpose of Requestor is to enable a DOCLINE library to enter requests on behalf of another library. The requesting library must have a record in Institutions, but they may or may not be a DOCLINE participant.

To change the name of the Requesting Library:

STEP	ACTION: Change Requestor
1	Select **REQUESTS** from DOCLINE Main Menu
2	Select **Borrow**
3	Select **Requestor**
4	Click in box labeled "Requestor LIBID", highlight and delete LIBID shown
5	Type in LIBID of library for which request is being made
6	Click **Change**.
View	The inputting library will receive a message indicating the LIBID and name of the requesting library for which they are entering requests. If the requesting library is an active DOCLINE participant, the ILL contact and phone number will be displayed.



Section D-4. Route Serial Requests

The routing order of requests for serials is determined by the information on the "Routing Instructions" page and algorithm below:

1. Prefix LIBID (if entered) -

The routing algorithm will only route a request to a library:

--IF -	[a.] the selected delivery method is supported by that institution;
--AND–	[b.] the institution is an active DOCLINE participant when the request routes.

Holdings are checked for the prefixed library, but will route regardless.

2. Routing Table (using cells selected) --

The routing algorithm will only route a request to a library:

--IF -	[a.] that institution reports holding either the volume or year of the title;
--AND–	[b.] the selected delivery method is supported by that institution;
--AND–	[c.] the institution is an active DOCLINE participant when the request routes.

3. Resource Libraries (if Refer to Resource Libraries selected) --

The routing algorithm will only route a request to a library:

--IF -	[a.] that institution reports holding either the volume or year of the title;
--AND–	[b.] the selected delivery method is supported by that institution;
--AND–	[c.] the institution did not previously reject the request in steps #1-2;
--AND–	[d.] the institution is an active DOCLINE participant when the request routes.

4. NLM (if Route to NLM Delivery selected) --

Request will route to NLM, its holdings are not checked.
NLM supports all delivery methods.

5. Refer on after NLM (if selected) -

The routing algorithm will only route a request to a Resource library:

--IF -	[a.] that institution reports holding either the volume or year of the title;
--AND–	[b.] the selected delivery method is supported by that institution;
--AND–	[c.] the institution did not previously reject the request in steps #1-3;
--AND–	[d.] the institution is an active DOCLINE participant when the request routes.

Section D-4. Route Serial Requests

If the system does not find a total of 20 resource libraries and/or primary access libraries that report holding the title, then it determines if the following four libraries report holding the title and either the volume or year: 1) American Hospital Association Library, 2) American Dental Association Library, 3) National Agricultural Library; and 4) Canada Institute for Scientific and Technical Information.

Section D-5. Route Non-Serial Requests

Because no holdings records are available for monograph and non-NLM serial items, requests route only to the institutions listed on your Routing Instructions page.

The following algorithm determines the routing order:

1. LIBIDs on Routing Instructions page –

Holdings are not checked.
Request is routed to the institutions listed:
--IF [a.] LIBID is valid;
--AND– [b.] the institution supports the selected delivery method;
--AND– [c.] the institution is an active DOCLINE library when the request routes.

2. NLM (if Route to NLM selected)

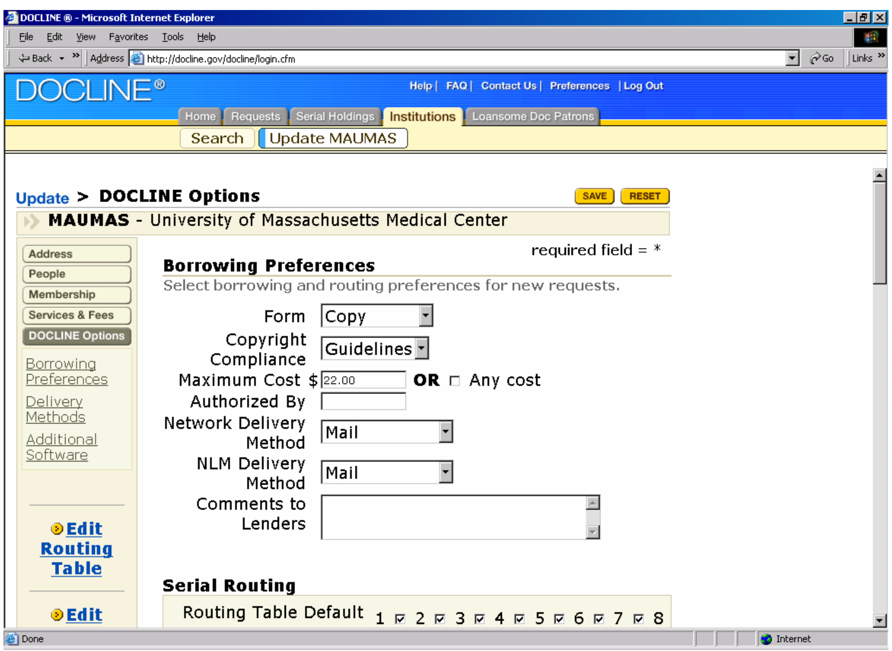
Request will route to NLM, its holdings are not checked.
NLM supports all delivery methods.

Section D-6. Change the Routing of Requests

To modify the default values that display on the Routing Instructions page during Borrow, do the following:

STEP	ACTION: Change Routing Defaults
1	Select **Institutions** from DOCLINE Main Menu.
2	Select **Update <LIBID>**.
3	Select **DOCLINE Options** in the Institutions navigation bar.
4	Modify the desired values in the Borrowing Preferences area of the "DOCLINE Options" page.
5	Modify the desired values in the Serial Routing area of the "DOCLINE Options" page.
6	Click **Save.**

Routing instructions may be changed for a specific request or set of requests during Borrow by modifying the default values on the *Routing Instructions* page.



Section D-7. Receive Requests

Libraries are notified in the Activity and Status area of the DOCLINE Home page when DOCLINE or Loansome Doc requests are awaiting receipt. Awaiting receipt indicates that a request has routed to your library based upon the borrower's routing instructions, your holdings, and your supported delivery methods.

Requests are "receipted" by clicking on the link in the Activity and Status area or by navigating to the Receipt page through the DOCLINE menu – **Requests**, then **Receipt**. Receipting a request indicates to the system and the borrower that you have viewed and acknowledged the interlibrary loan request.

Potential lenders have one business day to receipt a request and three business days to update a request after receipting it, before DOCLINE will automatically remove it and route to another potential lender.

Libraries can view a request without receipting it by navigating to **Status/Cancel**. Search by DOCLINE | Lend | All. The requests that have not been receipted will be listed under the Action column as 'New,' 'Rerouted TTA,' or 'Rerouted Online.'

NLM encourages the timely receipt of requests. Doing so provides a more accurate picture of active requests, which benefits all users of the system as both borrowers and lenders get an accurate status of requests. Timely receipting also prevents unnecessary rerouting of requests after 1 business day via "Time Triggered Actions".

Section D-8. Time-Triggered Actions

Several time-triggered actions occur automatically in DOCLINE, based on the length of time an ILL request is in the system and the action that has been taken on it.

An ILL request must be receipted by the lending library to which it was routed within **one working day** of entry into the system.

If a request is not receipted by 12:05 AM on the day following its entry into the system, DOCLINE removes the request from the first lending library and routes it to another potential lender.

If an ILL request is received but not acted upon within three working days, DOCLINE automatically routes the request to another potential lender. On the third day, the system displays the number of hours remaining before the request is rerouted.

On the second working day after an ILL request is receipted, DOCLINE issues a reminder message to the potential lender that there is one more day to update a request. This notification appears under Messages on the DOCLINE broadcast page.

Loansome Doc orders receipted by a DOCLINE ordering library, but not updated in LEND or transferred in BORROW, remain in the system thirty working days.

Users should avoid receipting and updating requests between 12:05 AM - 12:15 AM (Eastern Time), while the system is running time-triggered actions.

Note:

- When one of these holidays falls on a non-working day (Saturday or Sunday) the holiday is usually observed on Monday (if the holiday falls on Sunday) or Friday (if the holiday falls on Saturday).
- You have **three working days** to process requests that you receive. Time is counted beginning at 12:05 A.M. ET the day following their receipt. Weekend days are NOT counted as working days.

Section D-8. Time-Triggered Actions

- Time-triggered actions do **not** run on the following U.S. holidays:

  New Year's Day - January 1st

  Memorial Day - Last Monday in May

  Independence Day - July 4th

  Labor Day - 1st Monday in September

  Thanksgiving Day - 4th Thursday in November

  Christmas Day - December 25th

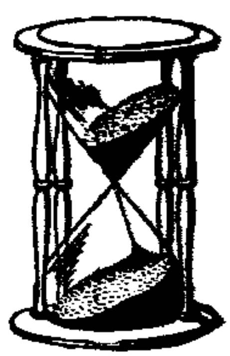
- The following U.S. federal holidays **do** count as working days for time-triggered actions, because many libraries are open:

  Martin Luther King, Jr.'s, Birthday - 3rd Monday in January

  Presidents' Day - 3rd Monday in February

  Columbus Day - 2nd Monday in October

  Veterans' Day - November 11th



Section D-9. Print Requests

Users are notified on the main DOCLINE HOME page when DOCLINE and Loansome Doc requests are waiting receipt. Receipts can be printed with barcodes.
Users can receipt requests from the broadcast page or from the RECEIPT icon menu.

To receipt DOCLINE or Loansome Doc requests and print each receipt on a single sheet of paper from the HOME page or Receipt menu option:

STEP	ACTION: Print Requests
1	Go to the DOCLINE HOME page where messages for your library are listed -or– From DOCLINE Main Menu: select **REQUESTS.** Select **Receipt.**
2	Click **DOCLINE receipts** or **Loansome Doc receipts** An acknowledgment message will appear. Click **OK.** [Users can view receipts by scrolling down the page.]
3	To print: click **Print/Download Receipts** at the bottom of the page.
4	A new window will open listing **all** the acknowledged requests .
5	Select **Print** from the File menu toolbar at the top of the page. Requests will print to your local printer. [Netscape users must use this print option.]
6	To close the "Print/Download Receipts" window: select **Close** from the File menu toolbar at the top of the page.
7	The system updates the number of requests receipted in display message.

Section D-10. Lending

The Lend feature allows DOCLINE libraries to update the status of requests received by their institution. Libraries can update their requests in batches or individually.

The **Batch Lend** feature allows libraries to quickly process requests with the same action. The action is either "filled as requested" or "rejected" with a single rejection reason. Batch Lend also provides the ability to use a barcode scanner to enter the request number. In Batch Lend, the user types or scans the request number to process the request.

The **Single Lend** feature allows libraries to update multiple requests individually with different actions and reasons at the same time. The Single Lend feature also allows libraries to update the Type and Form values as appropriate for each request. In Single Lend, the user selects the request to process from a list of outstanding requests.

Notes:

- If a request has not been updated within two working days of receipt, a message is displayed on the DOCLINE “Welcome” page.
- Requests not updated after three working days of receipt will be automatically re-routed by DOCLINE.

Section D-11. Fill Requests

To fill a single request please use the following steps listed in the table below:

STEP	ACTION: Fill Single Requests
1	From the DOCLINE main menu, click **REQUESTS**, then **Lend**.
2	Click the **Single** tab of the **Lend** window.
3	Select one request number per row from the Number drop-down list box.
4	Change values under the Action, Type and Form columns as needed.
5	Click **Update** to process these requests.
6	The "DOCLINE Requests Updated" window appears with the processed request number(s) displayed.
7	To process more requests, click **Return**.

Note:

- As each request number is selected, the values in the Action, Type and Form columns will display the information for that request. The default Action is "Filled".

To fill a batch of requests please use the following steps listed in the table below:

STEP	ACTION: Fill Batch Requests
1	From the DOCLINE main menu, click **REQUESTS**, then **Lend**.
2	On the **Batch** tab of the **Lend** window, enter the request number(s) in the input box. Separate entered request numbers with a space, a comma, or a line between them.
3	Click **Submit** to process these requests.
4	The "DOCLINE Requests Updated" window appears with the processed request number(s) displayed.
5	To process more requests, click **Return**.

Section D-12. Reject Requests

To reject a single request please use the following steps listed in the table below:

STEP	ACTION: Reject Single Request
1	From the DOCLINE main menu, click **REQUESTS**, then **Lend**.
2	Click the **Single** tab of the **Lend** window.
3	Select one request number per row from the Number drop-down list box.
4	Select **Rejected** from the Action drop-down list box.
5	Select the rejection reason from the Action drop-down list box.
6	Change the values under the Type and Form columns as needed for each request.
7	Click **Update** to process these requests.
8	The “DOCLINE Requests Updated” window appears with the processed request number(s) displayed.
9	To process more requests, click **Return**.

Note:

- As each request number is selected, the values in the Action, Type and Form columns will display the information for that request. The default Action is "Filled".

To reject a batch of requests please use the following steps listed in the table below:

STEP	ACTION: Reject Batch Request
1	From the DOCLINE main menu, click **REQUESTS**, then **Lend**.
2	On the **Batch** tab of the **Lend** window, enter the request number(s) in the input box. Separate entered request numbers with a space, a comma, or a line between them.
3	In the Action field, select **Rejected**.
4	In the Reason field, select the rejection reason from the drop-down list box.
5	Click **Submit** to process these requests.
6	The “DOCLINE Requests Updated” window appears with the processed request number(s) displayed.
7	To process more requests, click **Return**.

Section D-13. Find Requests

To find DOCLINE requests as a **Borrower:**

STEP	ACTION: Find Requests
1	From DOCLINE Main Menu: click **Requests**, then **Status/Cancel**.
2	Under "Set search limits" columns, select the following options from the drop-down boxes to create your search criteria: [a.] Select request type **DOCLINE** and **Borrow**. [b.] Select a set of requests to review: **All** (all requests as a borrower regardless of status), **Filled** (filled requests), **Pending** (requests still in process), or **Retired** (requests not filled for reason of: cost, canceled, incomplete, copyright, Beyond Routing Map, Expired). [c.] Select the number of "calendar" days to search by selecting **Begin** and **End** day's values. The options are 0-40 days equal to or less than today's date. A Begin day value of '0' and End day value of '40' would search for requests with an Action Date between today (0) and 40 days ago. The default values are Begin=0 and End=3 days.
3	From the **Sort** drop-down box, select "Asc" or "Desc" to display the results in either ascending or descending request number order. The default sort order is ascending. Then, click **Go**.
View	As the **borrower**, you see the last action taken on the displayed requests. When you search for: **All, Filled** or **Pending**, you see the following six labeled columns of information: **Cancel**, **Request #**, **Request Date**, **Action** (last action), **Action Date** and **Institution**. If you select the subset **Filled**, you get the following six labeled columns: **Request #**, **Request Date**, **Action** (filled), **Action Date** and **Lender** (the lending institution name). If you select the subset **Retired**, you get the following six labeled columns: **Request #**, **Request Date**, **Action** (action will always be a final unfilled action, e.g."Not Filled"), last **Action Date** and **Patron** (name).
4	To view a request, click the request number under the **Request #** column.
5	To view the lender's ILL information, including the phone contacts, charges and delivery methods, click on the **LIBID** next to the lending institution name. A new window will open with the ILL information. The entire Institutions record may be viewed by clicking the **Institutions Record** button at the bottom of the ILL information window. To return to the **Status/Cancel** screen click the close button at the bottom of the Institutions record window.
6	To view history, click action text (e.g. "Canceled") under the **Action** column.
7	To return to the Status/Cancel screen after viewing the request or the routing history, click **Return**.

Note: The Cancel checkbox only displays for requests still in process.

Section D-14. Cancel Requests

To cancel a request, do the following:

STEP	ACTION: Cancel Request
1	From DOCLINE Main Menu: select **Requests**, then **Status/Cancel.**
2	In the box under “Enter request number” column, enter request number. -or– Under “Set search limits” columns, go to drop-down boxes. Select **DOCLINE | Borrow | Pending**. Select the number of calendar days to search by selecting **Begin** and **End** day's values. The options are 0-40 days equal to or less than today's date. A Begin day value of '0' and End day value of '40' would search for requests with an Action Date between today (0) and 40 days ago. The default values are Begin=0 and End=3 days. Then, click **Go**.
3	Under the Cancel column, select check box adjacent to the request number to be canceled. Requests with the following status can be canceled immediately: [a.] **New -** new request entered by borrower, but not yet received by a lender. [b.] **Rerouted Online -** request was not filled by first lender, and rerouted to the next potential lender. [c.] **Rerouted TTA -** rerouted because of DOCLINE time-triggered actions after first potential lender did receipt or act upon the request. Requests that have been Received by an institution can only be “marked” for cancellation. Since the potential lender may be in the process of filling a Received request, DOCLINE will note that a cancellation is pending. The institution can update the request as Filled. If the request is updated as “Not Filled” by the lender, the request is immediately canceled. Borrowers can call the lender to notify them of the pending cancellation, but please understand if the lender's workflow does not permit this accommodation.
4	Click **Cancel Checked Items**. System acknowledges the request has been canceled. Click **Return** To deselect checked requests, click **Clear Checked Items**.

Notes:

- Only pending requests are eligible for cancellation.
- It is not possible to cancel a request that’s received by NLM.

Section D-15. View Routing History

STEP	ACTION: View Routing History
1	Click **Requests** in the DOCLINE Main Menu.
2	Click **Status/Cancel**.
3	In the box under “Enter request number” column, enter request number. **-or–** Under “Set search limits” columns, select desired values in the drop-down boxes. Click **Go**.
View	Depending upon your search limits, you will see six columns of data associated with the request(s).
4	To view a request, click the request number under the **Request #** column.
5	To view the history, click on the action text (e.g. "Not Filled" or "Canceled") under the **Action** column.
6	To view the lender's ILL information, including the phone contacts, charges and delivery methods, click on the **LIBID** next to the lending institution name. A new window will open with the ILL information. To return to the “Status/Cancel” screen, click **Close** at the bottom of the “Institution Record” window.
7	To return to the “Status/Cancel” screen after viewing the request or the routing history, click **Return**.

Section D-16. Determine the Status of a Request

To find the status of a specific request as a Borrower or Lender:

STEP	ACTION: Determine Request Status
1	From the DOCLINE Main Menu: Click **REQUESTS**, then **Status/Cancel.**
2	In the box under “Enter request number“column, enter the request number. Click **Go**.
View	The information displayed depends on whether you are the borrower or lender of the request you entered: [a.] As a **borrower**, you see the last action taken on the request you selected. There are six labeled columns of information: **Cancel**, **Request #**, **Request Date**, last **Action**, last **Action Date** and **Institution**. [b.] As a **lender**, you see six labeled columns of information: **Borrower** (name of borrowing institution), **Request #**, **Request Date**, last **Action**, last **Action Date**, and **ReRoute In**.
3	To view a request, click the request number under the **Request #** column. To view the routing history as a borrower, click on the action text (e.g. "Filled") under the **Action** column.
4	To return to the “Status/Cancel” screen after viewing the request or the routing history, click **Return**.
5	As a borrower, you may view the lender's ILL information, including the phone contacts, charges and delivery methods. Click on the **LIBID** next to the lending institution name. A new window will open with the ILL information. The entire Institutions record may be viewed by clicking **Institution Record** at the bottom of the ILL information window.

Notes:

- The **Cancel** checkbox only displays for requests still in process.

- On **ReRoute In:** on the third business day after receipt, the system displays the number of hours remaining before the request is rerouted in the **"ReRoute In"** column of Lend. Those requests should be acted upon immediately. If the request is not acted upon within three working days, DOCLINE automatically routes the request to another potential lender.

Section D-17. Resubmit Retired Unfilled Requests

To resubmit retired unfilled requests from the DOCLINE HOME page:

STEP	ACTION: Resubmit Retired Requests from HOME Page
1	From the DOCLINE Home page: select the "# DOCLINE requests were retired unfilled" link in the Messages area.
View	There are six labeled columns of information: **Resubmit**, **Request #**, **Request Date**, last **Action**, last **Action Date** and **Patron** name.
2	To view a request, click the request number under the **Request #** column.
3	To view the history of a request, click on the action text (e.g. "Not Filled" or "Expired") under the **Action** column. Users are strongly encouraged to review the history of a request prior to resubmitting to help determine which values to modify during resubmit (e.g. "Cost").
4	To return to the "Status/Cancel" screen after viewing the request or routing history, click **Return**.
5	To resubmit a request, click on request number (or red arrow) under the **Resubmit** column.
View	The values displayed on the Citation Input, Routing Instructions, and Delivery Address pages are from the retired request.
6	Review the citation of the retired request (non-PubMed requests only). As necessary, modify the citation on the Citation Input screen. Click **Next.**
7	Review the Routing Instructions of the retired request: If Not Filled (Cost), check the Maximum Cost field If Not filled (Canceled), check with the lender If Expired, check the Need by Date field If Beyond Routing Map, check the routing cells and delivery method selected Modify the routing instructions as necessary to maximize the chances of getting the request filled. Click **Reset** to apply your Routing Instruction values used in the retired request. Click **Next.**
8	Review the delivery address and modify as necessary. Click **Finish.** A new request number is generated.
9	Click **Return** to return to the Status/Cancel list of retired requests.

Note:

- A request number can only be resubmitted once.

Section D-17. Resubmit Retired Unfilled Requests

To resubmit retired unfilled requests from Status/Cancel:

STEP	ACTION: Resubmit Retired Requests from Status/Cancel
1	From the DOCLINE Main Menu: click **Requests**, then **Status/Cancel.**
2	In the box under “Enter request number” column, enter request number. -or– Under “Set search limits” columns, go to drop-down boxes to create your search criteria: Select request type **DOCLINE, Borrow** and **Retired.** Select the number of calendar days to search by selecting **Begin** and **End** day's values. The options are 0-40 days equal to or less than today's date. A Begin day value of "0" and End day value of "40" would search for requests with an Action date between today (0) and 40 days ago. The default values are Begin=0 and End=3 days.
3	From the **Sort** drop-down box, select "Asc" or "Desc" to display the results in either ascending or descending request number order. The default sort order is ascending. Click **Go.**
View	There are six labeled columns of information: **Resubmit, Request #, Request Date,** last **Action,** last **Action Date** and **Patron** name.
4	To view a request, click the request number under the **Request #** column.
5	To view the history of a request, click on the action text (e.g. "Not Filled" or "Expired") under the **Action** column. Users are strongly encouraged to review the history of a request prior to resubmitting to help determine which values to modify during resubmit (e.g. Cost, Need by Date, etc.)
6	To return to the “Status/Cancel” screen after viewing the request or routing history, click **Return**.
7	To resubmit a request, click on the request number or red arrow under the **Resubmit** column.
View	The values displayed on the Citation Input, Routing Instructions, and Delivery Address pages are from the retired request.

Section D-17. Resubmit Retired Unfilled Requests

8	Review the citation of the retired request (non-PubMed requests only). As necessary, modify the citation on the Citation Input screen. Click **Next.**
9	Review the Routing Instructions of the retired request: [a.] If Not Filled (Cost), check the Maximum Cost field; [b.] If Not filled (Canceled), check with the lender; [c.] If Expired, check the Need by Date field; [d.] If Beyond Routing Map, check routing cells and delivery method. Modify the routing instructions as necessary to maximize the chances of getting the request filled. Click **Reset** to apply Routing Instruction values used in the retired request. Click **Next.**
10	Review the delivery address and modify as necessary. Click **Finish.** A new request number is generated.
11	Click **Return** to return to the Status/Cancel list of retired requests.

Notes:

- "Status/Cancel" provides the ability:
  - to gain information about the status of borrow requests
  - to view request history
  - to review lending requests received, but not completed or updated
  - to cancel requests

- For more information on Resubmitting Retired Unfilled Requests, see:
  http://www.nlm.nih.gov/services/doc_resubmit.html

- All retired unfilled requests remain available for display from the "Status/Cancel" feature on DOCLINE for 40 calendar days. The "Resubmit" feature is also available during this time.

- It is recommended that before resubmitting to first determine the reason behind why request was rejected in the first place. Review request history first.

- A request number can only be resubmitted once.

- The next page displays a table of reason codes for rejecting borrow requests.

TABLE OF REASON CODES FOR REJECTING BORROW REQUESTS

ACTION VALUE	REASON	MEANS	BEFORE RESUBMITTING
Beyond Routing Map		None of the potential lenders in your Routing Table could fill the request.	Click on the Action Value link to view history and see why your request was rejected. You may need to expand your population of potential lenders (e.g. checkbox for Resource Libraries on the DOCUSER *Routing Instructions* screen.)
Expired		Request had a "Need By" date that passed before request could be filled.	Change the "Need By" date.
Not Filled	Cancelled	Request not filled, due to cancellation; check history for reason or cause.	Click on the Action Value link to see why the request was not filled.
Not Filled	Copyright	Request not filled, due to Copyright Guidelines or Laws.	
Not Filled	Cost *	Library received request but would have charged more than you indicated you were willing to pay.	Request is automatically cancelled, since it is assumed the remaining "higher" routing cells would assess full charges. If you would be willing to pay more, click the Resubmit link and change the value for "Maximum Cost".
Not Filled	Not Yet Received	Journal article request is very new; no potential lender is yet available.	

Section D-18. ILL Statistics and Reports

DOCLINE participants receive quarterly and annual reports produced by NLM.

Quarterly reports include summary and detailed information about each participant's activity as a borrower and as a lender. The reports on ILL and Loansome Doc order activity include such information as: the total number of requests borrowed and received; the number filled and not filled; and throughput time.

Reports are listed by type of request: journal, monograph or audiovisual. The annual report includes yearly summaries of quarterly reports for the calendar year and provides annual collection development information.

REPORT 1 - 1A: Summary DOCLINE Borrower Statistics

REPORT 1 - 1B: Summary DOCLINE Lender Statistics

REPORT 1 - 2A: Detailed DOCLINE Borrower Statistics

REPORT 1 - 2B: Detailed DOCLINE Lender Statistics

REPORT 1 - 7: Routing Table Statistics Report

REPORT 1 - 8: Ranked List of Serial Titles Requested

REPORT 5 - 1: Loansome Doc Detailed Lender Statistics

Note:

- An important (and often overlooked) “real-time” report is **Report 1-7,** that lists the libraries which have you in their Routing Table and in what cell.

Section D-19. View and Print Reports

VIEWING REPORTS

1. From the DOCLINE menu, click **REQUESTS**, then **Reports**.
2. To view a report, click on the report number.

PRINTING REPORTS

Printing with Internet Explorer 5.x or 6.x:

1. From the DOCLINE menu, click **REQUESTS**, then **Reports**.
2. Select the report to print.
3. From the IE menu: select “File”, then “Print”.
4. In the Print dialog box, select “Layout” tab.
5. Change the page orientation to Landscape.
6. Click **Apply**.
7. In the Print dialog box, click **Apply**.

Printing with Netscape 7:

1. From the DOCLINE menu, click **REQUESTS**, then **Reports**.
2. Select the report to view/print.
3. From the Netscape menu: select “File”, then “Print”. Under the Print Frames section, 'The selected frame' option should be selected (checked).
4. On the Print dialog box, click **Properties**.
5. On the Printer Properties dialog box, change page layout to Landscape.
6. Click **OK**.
7. On the Print dialog box, click **OK**.

Notes:

- Location of the Page Orientation (*IE Explorer*) and Printer Properties (*Netscape*) settings will depend up your printer & printer driver.

- You can also view quarterly statistics for your library (**Reports 1-1A through 5-1B**.) Quarterly reports are NOT archived permanently by NLM, so when a new quarter is loaded, data for the oldest quarter is replaced and is no longer available. Statistics for the last two quarters may be found in temporary archives at any time.

- It is recommended that you store data from NLM's quarterly statistical reports on your own computer’s local hard drive for future reference.

Section D-20. Download Reports

DOWNLOADING REPORTS to EXCEL

Downloading with Internet Explorer 5.x or 6.x:

1. From the DOCLINE menu, click **REQUESTS**, then **Reports**.
2. Select the report to download.
3. While viewing the report, from the IE menu: select “Edit”, then “All”.
4. From the IE menu select “Edit”, then “Copy”.
5. In Excel, open a new workbook.
6. Click in cell A1.
7. From the Excel main menu, select “Edit”, then “Paste”.
8. Add or modify formatting as desired for local needs.

Downloading with Netscape 7:

1. From DOCLINE menu, click **REQUESTS**, then **Reports**.
2. Select the report to download.
3. From the Netscape 7 menu, select “File”, “SaveFrameAs”.
4. On the “Save As” dialog box, name the file with an extension of .xls
5. In Excel, select “File”, “Open”
6. Select named report. (e.g., 2A_May00.xls)
7. Add or modify formatting as desired for local needs.

END OF MODULE